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WAR HISTORY OF CANNED FISH

I. PRE-WAR BACKGROUND OF INDUSTRY

The canned fish industry produces many different varieties of this product. The principal species in value and volume are salmon, tuna, pilchards, herring and mackerel. Minor products include river herring, oysters, shrimp and such special products as fish balls, codfish cakes, clam chowder and fish roe. In the discussion that follows the species will be named separately only where the remarks apply to particular species.

In general, canned fish are processed in the immediate vicinity of the fishing grounds for the particular species. Salmon is canned in Alaska, Washington and Oregon; pilchards in California; sea herring in Maine and Massachusetts; mackerel in Maine, Massachusetts and California.

The processing of canned fish is similar to that for producing other products which are packed in hermetically-sealed containers. Beheading and eviscerating is usually done by hand but in some instances special equipment is used. The retorts, can sealing devices and packaging equipment are similar to those used in most other canning operations.

Production figures for the years preceding the outbreak of the war in Europe are shown below. For purposes of comparison, a similar table of the production during the war years may be found in another section.

TABLE I

Canned Fishery Production of United States and Alaska, 1935 - 1939 (in thousands of pounds)

<u>SPECIES</u>	<u>1935</u>	<u>1936</u>	<u>1937</u>	<u>1938</u>	<u>1939</u>
Salmon					
United States	42,949	25,324	42,498	22,691	34,989
Alaska	246,390	405,005	320,144	326,736	252,632
Total Salmon	289,339	430,329	372,642	349,427	287,621
Herring					
Sardines	41,396	46,146	42,006	16,791	53,886
Sea Herring	--	--	--	--	--
Total Herring	41,396	46,146	42,006	16,791	53,886
Pilchards	116,163	125,593	134,998	108,561	149,188
Tuna	60,260	64,338	75,468	66,099	87,431
Mackerel	86,986	59,369	40,360	46,350	42,691
Shrimp	18,230	15,809	21,191	18,038	20,452
Other Fish, Shellfish & Roe	60,358	53,254	63,685	61,677	75,543
Total	<hr/> 672,732	<hr/> 794,838	<hr/> 740,350	<hr/> 666,943	<hr/> 716,812

Source: Annual Summary of Fish and Wildlife Service.

Import statistics for the years comparable to those shown in Table I are not readily available. However, the figures for 1939, which are shown below, are indicative of the volume of pre-war imports of canned fish:

TABLE II

Canned Fish:	1939
In Oil	44,837,000 lbs.
Not in Oil	15,668,000 lbs.
Canned Shellfish:	
Crab Meat	13,507,000 lbs.
Lobster's	970,000 lbs.
Other	928,000 lbs.
Total	75,910,000 lbs.

Prior to the outbreak of war, the greatest volume of canned fish was imported from the Scandinavian countries and the canned shellfish from Japan. The effect of the war upon these imports will be discussed in a later section.

The distribution of canned fish to the consuming public is handled through regular commercial wholesale and retail channels. In the pre-war years this distribution was on a wide-scale basis and canned fish was obtainable in practically every locality in the country. Consumption was naturally heavier in the coastal areas, due largely to the fact that tastes in those areas are more accustomed to fish.

The continued upward trend in the production of canned fish seems to indicate that the demand has never been fully satisfied in the United States. The industry has done little advertising and there are undoubtedly markets that have never been reached.

The only government regulation which directly affected the production of canned fish in the pre-war years was a California state law which required that a stated proportion of the catch of pilchards be prepared for food use rather than in the production of fish oil and fish meal. However, there were in effect certain conservation regulations of the Fish and Wildlife Service and of the several states which, while tending to reduce each year's total pack of fish by limiting the quantities allowed to be caught, will undoubtedly result in an increased production in the long run.

II. OUTBREAK OF WAR

The outbreak of the war in Europe and later with Japan had many immediate effects upon the canned fish supply. Tremendous requirements for the Army, Navy, Red Cross, War Shipping, Veteran's Bureau and many other government agencies, arose, to be met almost solely from U. S. production, thus drastically reducing the quantities available for civilians. In addition, imports of canned fish from the Scandinavian countries and of canned shellfish from Japan were immediately shut off (see Table IV) and the requisitioning of fishing boats by the Navy drastically reduced the quantity of fish available for canning.

Canning facilities in most regions were found to be insufficient to meet the war demands, and a limited amount of new equipment was installed and a few new factories were built.

During the war increased requirements for military and Lend-Lease purposes, supplied through an order requiring sale to governmental agencies of a specified percentage of the pack, reduced the quantity available for civilians, and canners increased production in order to supply as much as possible of their former civilian market. Achievement "A" awards granted by the War Food Administration, goals of production established by WFA for the use of Fish and Wildlife Service, and aid given by WFA and FWS in connection with priorities for equipment and materials probably had a considerable effect.

Prior to the war about a third of the domestic consumption of sardines in quarter-pound cans was supplied by imports from Norway. These have ceased entirely. There has been some increase in importation of canned tuna from South America to the west coast.

Canned fish will be needed for military, Lend-Lease and relief purposes until the close of the war. Immediately after the close of the war the civilian demand will probably be sufficient to absorb all or more than the canners can produce. It is questionable, however, whether this condition will continue for more than a year or two after the war.

As an inducement to salmon canners to take the risk of transporting men and materials from Seattle to the canneries in Alaska and return under war conditions, a special indemnification clause was inserted in the purchase contract for Alaska salmon. In the contract for the purchase of the 1942 pack this clause provided that in the event the canner was hindered in packing salmon by means of acts of the public enemy or by acts of the Government made in behalf of the war effort, then:

1. In event of failure to secure any pack, reimbursement should be 85% of the total "out-of-pocket costs".
2. In event of failure to obtain the reasonably anticipated pack, the reimbursement should be 85% of the actual total "out-of-pocket costs", less such proportion of the actual total "out-of-pocket costs" as the actual total pack bears to the reasonably anticipated pack.

Under these provisions no reimbursement could be made unless the loss was in excess of 15% of the anticipated pack.

The 1943 and 1944 contracts provided that:

1. In the event of failure to secure any pack, the measure of reimbursement should be 85% of the sellers "out-of-pocket costs".
2. In the event of a partial pack, the measure of reimbursement should be 85% of that portion of the "out-of-pocket costs" which bore the same relation to the total "out-of-pocket cost" that the quantity short bore to the total anticipated pack.

The contracts have provided for a committee to adjudicate claims for indemnification. This committee is composed of one member named by the claimant, one member named by the War Food Administration and one member selected by the two named members. Three claims have been filed under the indemnification provisions, all pertaining to the 1942 pack and aggregating about \$125,000. Settlement of these claims amounted to a little more than \$100,000.

III. ALLOCATIONS

Canned fish has been allocated both nationally and internationally. Nationally, to assure a supply adequate for the requirements of the armed forces and for Lend-Lease; internationally, because the world supply of canned fish was and is still insufficient to meet requirements.

International allocations of canned fish commenced early in the year 1943. The purpose of the international allocations was to distribute a short supply of fishery products so as to channel this high protein food into areas where it would accomplish the most for the war effort.

On March 12, 1943 the committee made the following observations:

1. Fish and fish products are foods of prime essentiality to the United Nations.
2. Certain important sources of fish are no longer accessible to the United Nations.
3. War circumstances in general, unless off-set by specific action, can further displace output remaining accessible areas.

The total production of canned fish available for allocation by the Combined Food Board was made up by the packs of the United States, Canada, Portugal, Spain, South Africa and the United Kingdom. From certain of these countries, particularly Portugal and Spain, only the export of the surplus could be brought under allocation. The total supply of canned fish which could be allocated under the plan was approximately 900 million pounds broken down as follows:

United States	667	million pounds
Canada	150	" "
Portugal	30	" "
South Africa	5	" "
United Kingdom	5	" "
Spain	3	" "

After making allowances for about 300 million pounds for United States civilians and 15 million pounds for Canadian civilians, the balance of this canned fish was allocated to military services, the United Kingdom and other countries and agencies where the supply of protein food was considered to be essential to the war effort.

In 1943 the balance of available canned fish was allocated as follows:

United States Military and War Services	140	million pounds
United Kingdom	185	" "

Red Cross	7	million pounds
Hawaii	6	" "
Puerto Rico	2.5	" "
Latin America, Caribbean	12	" "

This left approximately 180 million pounds as a contingency reserve out of which emergency allocations have been made and could be made available to liberated countries.

In 1944 approximately the same quantity of canned fish available for allocation and approximately the same quantities reserved for United States and Canadian civilian use and balance of 530 million pounds was divided about as follows:

United States Military and war services	271	million pounds
United Kingdom	89	" "
Red Cross	8	" "
Hawaii	5	" "
Puerto Rico	10	" "
Latin America, Caribbean	10	" "
Liberated Areas	77	" "
Greece	20	" "
U. S. Territories	15	" "
Contingency Reserve	40	" "

Domestic allocations commenced July 31, 1942 and were originally handled jointly by the Food Requirements Committee and the Fisheries Committee composed of representatives from War Production Board, State Department, Navy, Interior, Agriculture Tariff Commission, Office of Civilian Supply (War Production Board), War Shipping Administration, Lend-Lease Administration, Office of Price Administration and Board of Economic Warfare.

At the first meeting of this composite committee on August 12, 1942, with War Production Board, Food Branch, presiding, the following policy was laid down: "The Food Requirements Committee and the Fisheries Committee have the responsibility of making allocations to meet military, Lend-Lease, and civilian requirements when such action is necessary to make the most efficient use of potential supplies."

The first domestic allocation made October, 1942, was as follows:

Canned Salmon	264,160,000
California Pilchards	240,000,000
Maine Sardines	60,000,000
Mackerel	36,000,000
Grand Total	<u>600,160,000</u>

The responsibility for food supply distribution was delegated to the War Food Administration under Executive Order No. 9280 and as a result all domestic allocations for the fiscal years 1943-1944 and 1944-1945 were handled by the Requirements and Allocations Control Branch within the framework of the War Food Administration. The domestic allocations for these two years are shown below:

1943-1944 Allocations

Canned Salmon	312,518,000
Pilchards	196,310,000
Maine Sardines	48,763,000
Mackerel	45,415,000
Tuna & Other Fish	125,769,000
Grand Total	<u>728,775,000</u>

1944-1945 Allocations

Canned Salmon	290,286,000
Pilchards	216,197,000
Maine Sardines	82,823,000
Mackerel	71,256,000
Tuna & Other Fish	144,926,000
Grand Total	<u>805,488,000</u>

The above allocations were apportioned among the various government and civilian claimants on a basis of requirement estimates and were implemented by Food Orders to assure that distribution of production would be in accordance with these allocations. These Food Orders are discussed in detail in Section IV.

IV. DISTRIBUTION ORDERS

At the beginning of the war it became clearly evident that certain canned foods must be set aside under Government order if quantities sufficient for essential purposes were to be obtained. As a basis for such set-asides, Order M-86 was issued by the War Production Board, dated March 13, 1942. This order provided that the canner should set aside for the requirements of the Government such canned foods packed by him as the Director of Industry Operations might from time to time order.

On May 26, 1942, Supplementary Order M-86-b was issued specifying that all species of salmon, pilchards, Atlantic sea herring, Atlantic mackerel, and Pacific mackerel were subject to the provisions of Order M-86. This order and supplementary amendments provided for the delivery to governmental agencies of 60% of the 1942 salmon pack and 80% of the other species mentioned above.

On February 19, 1943, the responsibility for administration of this order having been transferred to Food Distribution Administration, FDO-23 was issued as a continuation of Order M-86-b, until April 1, 1943.

FDO-44, issued April 1, 1943, provided for restrictions on the delivery of canned fish rather than a straight set-aside of canned fish for the government. Sixty percent of all salmon, pilchards, sea herring, mackerel, horse mackerel and shrimp and 70% of all tuna, yellowtail and Bonita packed during any period beginning April 1, 1943 and ending prior to March 1, 1944 were required to be delivered to governmental agencies before sales could be made to civilians from the pack of that period. Tuna, yellowtail and Bonita were removed from the order on June 27, 1943. FDO-44, amendment 2, effective March 1, 1944, had similar provisions for the delivery to the Government of 60% of the 1944 salmon pack and 45% of the pilchards, sea herring and mackerel packs.

On June 29, 1944, because of increased Government requirements, the percentage for pilchards, sea herring and mackerel was increased to 55, 40% of the chum salmon pack was reserved for governmental use.

A short pack of salmon necessitated an increase in those percentages, on August 30, 1944, to 70% for red, pink, coho and chum. Additional requirements of the Army made it necessary to increase the percentage on pilchards and West Coast mackerel to 100% from January 14 to March 31, 1945. These percentages are expected to be sufficient for Government requirements to June 30, 1945.

Most of the petitions received under the hardship clause have been based on the unsuitability of the product or the small amount of the canner's total pack. There have been 21 cases of apparent non-compliance with the various set-aside orders on canned fish (M-86-b, FDO-23 and WFO-44). Of these cases 8 were disposed of by warning letters, 4 injunctions were obtained and in one case a canner pleaded guilty to a criminal information and was fined \$10,000. The violator also signed a consent decree. In 8 cases no action was necessary as a result of an investigation. The large majority of the canners have shown an extremely cooperative attitude toward the restrictive measures provided in the orders.

The application of these orders pertaining to the canned fish industry, has enabled this Administration to maintain a constant flow of canned fish, in the necessary amounts, to all claimants designated as essential to the furtherance of the war effort. The industry as a whole has benefitted by the equalization of demands placed upon the various canners, allowing each to supply his domestic markets in an amount proportionate to his pack. A reasonable good distribution to all segments of the consumer market has been maintained as a result of the order.

V. OTHER GOVERNMENT REGULATIONS

A. Rationing

The following listed species of canned fish and shellfish were placed under point rationing by Ration Order No. 16, issued December 6, 1943:

Bonita	Sardines
Mackerel	Shrimp
Oysters	Tuna
Salmon	Yellowtail

Effective January 30, 1944, Ration Order No. 16 was revised placing the ration value of canned fish and shellfish at 12 points a pound. A ration value of 16 points had been in effect since December 6, 1943. Canned oysters remained at 4 points a pound. In April, 1944, mackerel and sardines were reduced to 8 points, and all canned fish were removed from the point rationing list on May 4, 1944.

Effective September 30, 1944, canned fish of the following species were again included under point rationing at the values shown: salmon, tuna, Bonita and yellowtail, 6 points per pound, mackerel and sardines, 4 points per pound; oysters, 2 points per pound.

B. Price Ceilings

The following species of canned fish have dollars and cents ceiling prices issued by the Office of Price Administration at the canner's level. Wholesale

and retail prices are controlled by percentage mark-ups at each level. Unless otherwise mentioned, the following price orders establish one ceiling price for all sales whether Government or commercial.

- (a) MPR-247 - Crabmeat
- (b) MPR-396 - Atlantic Sea Herring and Alewives, provides two ceiling brackets, government agencies and commercial
- (c) MPR-277 - Mackerel, Pacific and Atlantic
- (d) MPR-328 - Oysters
- (e) MPR-265 - Salmon
- (f) MPR-209 - California Sardines (Pilchards)
- (g) MPR-184 - Maine Sardines, provides two ceiling brackets, government agencies and commercial
- (h) MPR-311 - Shrimp
- (i) MPR-299 - Tuna
- (j) Supplemental Order No. 34, permits the additional cost of special packaging to be added to the ceiling price if the packing specified by government agencies differs from standard packing.

S.O. 75 issued by Office of Price Administration makes ceiling on canned fish 97-1/2% of the price for sales to civilians to apply on sales of canned fish to the Government.

An Office of Price Administration Order dated March 14, 1944, effective March 20, 1944, places the basis for ceiling prices on Maine sardines at the cannery, thereby removing the previous requirement that prices be adjusted to an f.o.b. Portland, Maine basis.

MPR-537, dated May 30, 1944, raised the price ceiling for flaked fish. The ceiling on 1½-ounce cans of flakes from codfish and haddock was raised from \$3.60 to \$4.10 per dozen. Increases for other can sizes were in proportion.

MPR-311, amendment 1, effective June 1, 1944, raised the ceiling on canned shrimp. The ceiling for Jumbo shrimp was raised from \$3.05 per dozen cans to \$3.60 per dozen cans for wet pack, and \$3.15 to \$3.70 per dozen for dry pack. Increases for other types of pack were in proportion.

MPR-448, amendment 1, effective June 15, 1944, fixed the price ceiling for Minced Razor Clams at \$2.25 per dozen cans for 1/2 flats, and \$3.25 per dozen cans for No. 1 E.O. It also fixed the ceiling for whole Razor Clams at \$3.10 per dozen for the No. 1 E.O., and \$4.45 per dozen for No. 1 Tall.

Ceiling price on tuna sold to canners was raised by 3-1/4¢ per pound under MPR-418, amendment 37. Ceiling prices for canned crabmeat were revised upward under MPR-247, amendment 1. Ceiling prices for Maine sardines were revised to provide for deduction of 12-1/2¢ per case for cans without keys under MPR-184, amendment 5.

C. Price Support

Because of the nature of the fish canning industry and its dependency upon such unpredictable factors as the size, species and variety of the season's catch of fish, it has not been practicable or desirable to initiate any price support program for this commodity.

D. Imports

Government control over imports of canned fish, which was formerly maintained through War Production Board Order M-63, was transferred to the War Food Administration and War Food Order 63, effective November 13, 1944, was issued to continue the control in effect.

While the Government had no requirements for many of the items under M-63, it was necessary to impose certain restrictions in order to conserve shipping space, which was especially critical at the beginning of the war. For this reason, authorized imports of fish items from Spain and Portugal were restricted to Spanish or Portuguese vessels, and imports from Cuba or the Bahamas were restricted to the use of small boats.

Canned lobsters and tuna fish have been removed from import control and, effective February 15, 1944, the following canned fish are subject to WFO-63, as amended: Anchovies, Herring, Salmon, Sardines and other Herring, all other canned fish for which a separate class or commodity number has not been assigned by the Statistical Classification of Imports of the Department of Commerce.

E. Processing Facilities

Practically all items of fish canning equipment are now covered by WPB Order L-292, as revised January 6, 1945, to include amendments 1 to 3. WPB Order P-115, which formerly controlled the distribution of canning machinery, has been revoked concurrently with the reissuance of the revised L-292.

Under the amendment of January 6, 1945, the restriction requiring an AA-5 or better rating for the purchase of canning equipment is removed. However, priorities assistance, when required, will be available for the procurement of equipment necessary to the maintenance of existing operations and to the expediting of programs of the War Food Administration.

VI. PRODUCTION AND IMPORTS

The following table, extracted from the annual report of the Fish and Wildlife Service, reflects the effect on the industry of the drastic measures which were necessitated by the war. The second table shows the even greater effect of cutting off the larger sources of imported canned fish and shellfish.

A. Production

TABLE III

Canned Fishery Products of United States and Alaska, 1940 - 1944
(in thousands of pounds)

Species	1940	1941	1942	1943	1944 (Estimated)
Salmon					
United States	25,712	43,180	36,434	13,200	11,344
Alaska	243,328	332,738	243,647	260,559	234,650
Total Salmon	269,040	375,918	280,081	273,759	245,994

TABLE III (CONT'D.)

Species	1940	1941	1942	1943	1944 (Estimated)
Herring					
Sardines	27,944	78,282	55,219	47,801	65,000
Sea Herring	—	726	3,316	3,044	5,000
Total Herring	27,944	79,008	58,535	50,845	70,000
Pilchards	141,402	240,343	168,508	150,221	157,500
Tuna	100,481	70,358	52,500	56,700	70,350
Mackerel	68,110	44,880	32,454	42,167	54,500
Shrimp	16,744	13,273	14,450	9,268	8,400
Other Fish, Shell-fish and Roe	84,757	100,380	54,107	34,278	38,982
Total	708,478	924,160	660,635	617,238	645,726

B. Imports

TABLE IV

Fish and Shellfish: United States Imports for Consumption
from all countries, 1940-43 and Jan.-June, 1944
(in thousands of pounds)

	1940	1941	1942*	1943*	1944* (Jan.-June)
Canned Fish					
In Oil	24,078	12,050	2,491	3,638	2,894
Not in Oil	6,607	3,297	2,845	1,263	2,112
Total	30,685	15,347	5,336	4,901	5,006
Canned Shellfish					
Crab Meat	11,861	6,669	1,172	***	**
Lobsters	1,678	1,917	1,844	2,382	1,194
Other	687	591	161	60	82
Total	14,226	9,177	3,177	2,112	1,278

* Preliminary. Strictly CONFIDENTIAL and not for publication.

** Includes negligible quantities dried or canned.

*** Less than 500 pounds

Source: Compiled from official statistics of the U. S. Department of Commerce.

VII. GOVERNMENT PURCHASES

Table V, taken from the records of purchases by the War Food Administration (including FSCC, SMA, AIA and FDA) indicates the value and volume of canned fish which has been procured for the Army, Navy, Lend-Lease, Red Cross and for many other Government programs. By far the greatest volume of these purchases were made in pursuance to the War Food Order (See Section IV) which required that specified percentages of certain varieties must be set-aside for this purpose.

TABLE V

COMMODITY	POUNDS			COST				
	1941	1942	1943	1944	1941	1942	1943	1944
Clams	—	—	86,100	—	—	—	22,235.00	—
Misc. Flaked	—	—	1,161,470	107,623	—	—	30,124.30	—
Misc. Ground Pilchards	—	—	—	—	—	—	—	—
Menhaden	—	—	1,723,761	—	—	—	90,461.05	—
Herring, River	445,875	2,627,967	—	—	32,665.00	—	35,525.00	—
Herring, Sea	988,008	1,977,518	3,129,876	2,785,119	110,142.68	237,736.74	391,886.00	381,587.53
Mackerel, Cd.	2,766,230	20,950,890	25,007,862	26,790,648	256,438.80	2,592,126.85	2,987,376.97	3,357,677.99
Misc.Cd.Fish	—	—	—	—	—	—	—	—
Menhaden	—	900,000	—	—	—	136,000.00	136,300.00	—
Dehydrated Fish(Mullets)	—	—	—	—	224,000	—	—	268,800.00
Squid	—	—	—	1,096,503	5,688,955	—	131,366.37	632,937.33
Oysters, Cd.	—	—	—	34,650	—	—	—	—
Pilchards Cd.	116,086,252	107,973,367	76,740,797	93,851,232	8,639,274.83	9,364,876.87	5,313,458.01	8,523,091.40
Salmon, Cd.	70,854,108	169,128,254	148,405,508	156,262,346	12,883,988.32	36,360,262.16	33,224,877.42	34,524,705.39
Sardines, Cd.	7,117,117	37,281,037	24,990,867	28,545,568	1,161,305.96	7,260,511.90	4,850,828.13	6,055,130.11
Shrimp, Cd.	—	—	4,024,877	176,097	—	—	32,200,612.60	95,559.45
Tuna Fish, Cd.	—	—	8,947,797	52,926	—	—	5,769,209.71	21,987.53

VIII. INDUSTRY OPERATIONS DURING WAR

There have been no new technical changes in the facilities to produce canned fish during the war. Such changes as have occurred in the plants have been mostly for the purpose of increasing the production. Some of the plants have put in improved equipment during the war, but that equipment, in general, constitutes an improvement only in that particular plant and not a technical development in the industry.

There have been no additional uses of canned fish during the war. They are now used for human consumption as before.

There are no substitutes for canned fish. It is possible that frozen fish is replacing canned fish to some extent as a long term proposition and that this tendency may have increased slightly during the war.

Probably the most outstanding changes in processing techniques have been brought about by the Salmon Canning Concentration Plan and the Coordinated Pilchard Production Plan.

Under orders issued by the Coordinator of Fishers in 1942, the Alaska salmon canneries in the same vicinities have been required to consolidate their operations. The fish usually handled by two or more canneries are now packed by a single plant, the other canneries in that concentration group being closed during a part or all of the season. The purpose of the plan is to achieve the maximum utilization of the available processing facilities.

The purpose of the Coordinated Pilchard Plan is to exercise control over the relative production of canned pilchards and of fish oil and meal to divert more pilchards to the canneries.

This plan was instituted in September, 1942, by Order M-206 of the War Production Board. The authority over the production of fishery products was transferred to the War Food Administration and was transferred by that agency to the Coordinator of Fisheries on February 8, 1943. Orders covering the 1943 and 1944 production have been issued and administered by the Coordinator of Fisheries.

Both of these plans have had the enthusiastic cooperation of the industry, and have been very successful in their objectives.

There has been probably little change in the techniques of distribution and marketing. The same channels of distribution are used now as were used before the war.

The character of the relation between the fish canning industry and the U. S. Department of Agriculture is indicated by the following:

1. An industry advisory committee of the canned fish industry was organized in January, 1944, meeting for the first time on January 6, 1944. The same committee met again on February 1, 1945.
2. The Fish and Fish Products Division of the Special Commodities Branch of the Department of Agriculture has had two chiefs who were drawn from the fish canning industry.

3. The Fish and Fish Products Division and its staff have given aid to the canners in connection with priorities for containers and equipment.

IX. SUMMARY

The beginning of 1945 finds all segments of the fish canning industry preparing to produce at maximum capacity for the coming season, insofar as the labor situation will allow. It finds civilian markets clamoring for canned fish due to the heavy take of the Government for military and Lend-Lease purchases, and due to the shortage of other protein foods. The equipment seems to have been kept fit and capable of working at maximum efficiency, but shortage of labor has reduced the pack in almost all parts of the industry.

There will be no problem of reconversion of the fish canning industry. The plants will produce the same products as they did during and before the war. There will be some problems connected with marketing.

1. Some domestic markets have undoubtedly been partially lost and will have to be regained.
2. Export markets in the Far East have been lost during the war and the industry will no doubt attempt to regain these.
3. The return of the competition of Norwegian sardines will become a problem within a year or so after the war, particularly with the Maine sardine industry.

The close of the European war should reduce somewhat the demands for canned fish for military and Lend-Lease uses. This will leave a greater portion of the pack for the civilian trade. Similarly, at the close of the Pacific war an additional quantity will be available for United States civilians. However, there is no doubt that canned fish will still be required for relief purposes in foreign countries, and that it will require a year or more after the close of the Pacific war before the industry can distribute its entire pack to its former trade.

It will probably be necessary to retain the reservation order on canned fish until after the close of the war in both European and Pacific theaters. Thereafter, this question will depend on the quantity required for foreign relief purposes.

Prepared By:
Authorities and Procedures Section
Special Commodities Branch
February 14, 1945

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